



Storyboard Case Recordings – Private Provider

This storyboard demonstrates how to view, enter and edit Case Recording information in Family Cases for Private Providers

Table of Contents

Navigating to the Screen.....	2
Case Recording Options	4
Entering a Case Recording.....	5
Adding Contact Types, Methods and Locations.....	6
Adding Participants	8
Adding Additional Persons to Participants.....	10
Completing the Recording.....	11
Adding an Addendum to a Completed Recording.....	13
Mark in Error.....	14
Printing Case Recordings.....	15
Frequently Asked Questions	16

Navigating to the Screen

This screen will display when first accessing TFACTS.

Enter your **Username** (en number) and **Password** to log in.

The **TFACTS Home** screen/**Workload** screen displays listing all your assigned work items.

- Click the **arrow** corresponding to the child's **Ongoing Case**.
- Click the **Recordings** link.

- Notice that while on this page above, there are other quick links in blue below the Recordings link. If you hover your mouse over each of these quick links icons, it will give a description of where the icon will take you once you click on it. Monthly Summaries are no longer entered under Case Recordings.

Once you click on the **Case Recordings** link, you will be taken to the **Case Recordings** module within the case.

- Click on the **Search** button to retrieve all case recordings.
- TFACTS will only display 500 case recording records at a time. If you cannot locate the case recording you are searching for, try entering additional search criteria to narrow down the results.
- Enter one or more search criteria values in the **Recording Search Criteria** box; then click the **Search** button. This will retrieve only a subset of recordings that matches your criteria.

If the client is already on your workload, you can proceed from this point on to the next page.

NOTE: If the family case is not on your workload, you can perform a **Person Search**, using the **Search** option at the top of the TFACTS screen. Put in the person's name and/or other information, click the **Search** button. Click the **Select** link by the correct person's name that was found.

This will take you to the **Person Overview** screen, click on **TFACTS History** link, and then click on the **Case History** option. Click on appropriate case number under the **Case ID** column. This opens up the **Case Overview** screen. Click on **Case Recording** link and this will take you to the same screen as you see above at the top of this page.

Case Recording Options

The following **Case Recording** options below function the same for all case recording types.

The screenshot shows the 'Case Recording' section of the TFacts Storyboard. It includes a sidebar with navigation links like 'Case Overview', 'Case Recording', 'Forms/Notices', 'Assessments', 'Document', 'CFM', 'Strengths and Concerns', 'Permanency Goals', 'Visitation Plan', 'Permanency Plan', 'Case Services', 'Court', and 'Removal Records'. The main area has a 'Case Header' with fields for Case ID (305), Case Name (Fu), Case Status (Open), Organization, and Region. Below this is a 'Recording Search Criteria' section with fields for Contact From Date, Contact To Date, Entered By, Location, Status, Participant, Contact Type, and Contact Method. There are 'Search' and 'Clear Form' buttons. Below the search criteria is a 'Recording List' section showing a table of recordings. The table has columns for Recording ID, Status, Contact Date, Contact Method, Contact Type, Participant, Entered By, and Location. Two recordings are listed: one with ID 7082511 in 'Draft' status and another with ID 27025986 in 'Completed' status. Each row has a 'select' link and a 'delete' link. The 'delete' link for the 'Draft' recording is highlighted with a red box.

Recording ID	Status	Contact Date	Contact Method	Contact Type	Participant	Entered By	Location
7082511	Draft	04/12/2016	Face To Face	Private Provider/Child Contact	Dur Xin Sar	Fon Fan	
27025986	Completed	03/24/2016	Face To Face	Private Provider/Child Contact	Dur Xav	Fon Ruso	

- **Add Recording** – Click this button to create a new case recording. Clicking this button will open up the **Case Recording Detail** page for information to be entered.
- **Print**- Once you have executed the **Search** function to retrieve the desired recordings, the **Print** button will then become enabled. Clicking the **Print** button will open up the **Print** page that displays the list of case recordings that were returned in your search. You can choose to print all, or some, in this screen.
- **Clear Form**- This button allows you to clear all of your search criteria that you may have entered so you can begin a new search.
- **Select**- Click the **Select** link on a specific recording row to view/update the detail for that recording. The **Case Recording Detail** page of an existing recording will display.
- **Delete**- The **Delete** link is enabled only for recordings in **Draft** status. Click this link to **Delete** the recording. A recording that has been completed can only be **Marked In Error**, it cannot be deleted. We will discuss the Marked In Error function later in this storyboard.

NOTE: Only the creator of the recording and workers with **Case Recording Delete** security profile shall have the ability to delete a case recording via the **Delete** hyperlink.

Continue to next topic

Entering a Case Recording

Once you have clicked on **Add Recording** button, it brings up the **Recording Detail** screen. It displays the following information:

The screenshot shows the 'Recording Detail' form with the following fields and controls:

- Recording ID:** 27082514
- Created By:** Fori
- Created Date:** 04/14/2016
- Contact Date:** A date picker with a '+' icon and a calendar icon.
- Recorded For:** A dropdown menu with 'Employee Search' and 'Clear' buttons.
- Contact Type:** A dropdown menu with 'select' and 'No Contact Type Selected'.
- Worker Present?** A checkbox.
- Contact Method:** A dropdown menu.
- Location:**
 - Location Type:** A dropdown menu.
 - If Court, School or Other, Describe:** A text input field.
 - Resource:** A dropdown menu with 'Resource Search' and 'Clear' buttons.
 - Copy To Resource Record?** A checkbox.
- Purpose:**
 - Available Purposes:** A list box containing 'Permanency', 'Safety - Child/Community', 'Service Planning', and 'Well Being'.
 - Add >>** and **<< Remove** buttons.
 - Selected Purposes:** An empty list box.
- Participant:** A table with columns: Participant Name, Date of Birth, Role, and Social, Medical, Educational Needs Addressed?. The table currently shows 'No Results Returned'.

- **Recording ID number**- Each recording is given a specific identification number upon entry that helps to identify it.
- **Created By**- Auto-populates the name of the person that is entering the recording.
- **Created Date**- Auto-populates as the date the recording is physically entered.
- **Contact Date** field- Enter the date the contents of recording actually occurred. You cannot move forward with the recording until a Contact Date has been entered.
- **Recorded For**-If you are entering a recording for someone else, you can click on the **Employee Search** field and pick the appropriate employee from the search results.

Once you have entered a **Contact Date**, you are now ready to enter a **Contact Type**. On the next page are the various examples of **Contact Types** for Private Providers on a family case.

Continue to the next topic

Adding Contact Types, Methods and Locations

Contact Types for Private Provider staff in a Family case.

Select Contact Type

Result(s) 1 to 9 of 9

<input type="checkbox"/>	Contact Type(s)
<input type="checkbox"/>	Notation
<input type="checkbox"/>	Private Provider/Child Contact
<input type="checkbox"/>	Private Provider/Child Visit with Other Family Member/Kin
<input type="checkbox"/>	Private Provider/DCS Contact
<input type="checkbox"/>	Private Provider/Parent Contact
<input type="checkbox"/>	Private Provider/Parent-Child Visit
<input type="checkbox"/>	Private Provider/Resource Parent Contact
<input type="checkbox"/>	Private Provider/Resource Parent-Child Visit
<input type="checkbox"/>	Private Provider/Sibling Visit

- **Contact Type**-Check the box(es) beside the **Contact Type** (or types) that apply. Multiple contact types can be chosen.
- Once your **Contact Type(s)** are chosen, click **Save**. You will be returned to the **Recordings List** screen.
- **Worker Present?**- This field has a drop down of **Yes** or **No**. This field will be disabled depending on some **Contact Types**.
- **Contact Method**- Choose the corresponding **Contact Method** that fits your situation.

Contact Type

[select](#) Private Provider/Child Contact

Worker Present?

Contact Method:

Location

Location Type:

Resource:

Copy To Resource Record? ☐

- **Location Type**- Choose the corresponding **Location Type** that fits your situation. If **Court**, **School**, or **Other** location type is chosen, you should describe the location in the field provided to the right of the **Location Type** field.

NOTE: **Location Type** is required if the **Contact Method** is **Face to Face**.

- If **Resource Home** is the **Location Type**, you will click the **Resource Search** button and locate the **Resource Home** where the visit occurred, click **Select** by the appropriate Resource Home to bring it back to the **Recordings Detail** screen.
- Click the check-mark field by the **Copy To Resource Record?** field if you would like the recording to carry over to the **Resource Home Activity Log**.

At the bottom portion of the **Recording Details** screen are the remaining fields that must be completed.

- **Purpose**-Select the **Purpose(s)** that apply to this recording in the **Available Purposes** box, click on the **Add>>** button to move to the **Selected Purposes** box on the right.

Continue to the next topic

Adding Participants

Click on the **Add Participant** button and it will take you to the following screen where you can select multiple participants.

- **Child Present**- This list will display children to choose to show if they were seen during this recorded visit. **Tip:** Child might not show up as a **Child Present** if they are missing a date of birth.
- **(SME) Social, Medical, & Educational Needs Addressed?**-Click **Yes** or **No** as it applies, if one or more of these were discussed during the visit.
- **Case Members**- Lists all persons that are displayed on the Case Member tab within the family case. Check-mark those members that were present at the visit.
- **Associated Person**- Lists all persons that are displayed on the Associated Persons tab within the family case.
- **Assigned Worker**- This list will display all assigned workers at the date/time of the Contact Date.
- **Other Worker**- If you do not show up as an assigned worker and are assigned to the case, you can go under the **Other Worker** tab, initiate a person search to locate your name. Click on **Select** by your name to add yourself as a Participant to the recording. This can be used to also add **DCS Staff** workers that were present.

- Click **Save** to return to the **Recording Details** screen.
- Back on the **Recording Details** screen, you can see the list of **Participants** and their **Roles**.

You can delete any **Participants** that were added in error by clicking on the **Delete** link. If you need to add additional **Participants** at this point, you can still click on the **Add Participants** button while the recording is in **Draft** status.

Participant
Result(s) 1 to 5 of 5

Participant Name	Date of Birth	Role	Social, Medical, Educational Needs Addressed?	
Bc	06/04/2000	Child Present	Yes	delete
Bc	05/14/1999	Child Present	Yes	delete
Bc	04/10/1965	Case Member		delete
Cc	03/29/1964	Case Member		delete
Pa				delete

[Add Participant](#)

Narrative Details
(Note: Provide a detailed summary of purpose, interactions, discussions, observations, assessment of progress, agreements, decisions and next steps. Refer to HELP for further instructions on documentation.)

Narrative:
Enter detailed narrative with all recording/visit details.

[Expand](#) [Spell Check](#) [Clear](#) 11:040

Status: * Draft

[Apply](#) [Save](#) [Cancel](#)

- **Narrative-** Currently, for Private Providers, a detailed narrative is not required.
- Click **Apply**.

NOTE: If you click **Save** instead of **Apply**, it will return you to the **Recording List** screen. You will have to click on **Select** link by the recording to return to the **Draft** status recording.

- **Expand** button- This button expands the narrative section to a full screen.
- **Spell Check** button-Select your narrative section and click on the **Spell Check** button for any spelling errors.

Continue to the next topic

Adding Additional Persons to Participants

If you wish to add an additional **Participant**, and your recording is still in **Draft** status, use the following steps.

- Click the **Person (+)** expand button.
- Click on the **Person Search** button, it will take you to the **Person Search** screen.

Select Person

- ☐ Child Present (2)
- ☐ Case Member (7)
- ☐ Associated Person (6)
- ☐ Assigned Worker (2)
- ☒ **Person (0)**

	Name	DOB	Role
No Results Returned.			

Person Search

☐ Other Worker (0)

Save Cancel

- Put in the person's name (and any other information you may have), in order to perform a search.
- If the person is located in the **Person Search Results** list, check-mark the box by the person's name. Click on the **Choose** button at the bottom of the screen.

Last Name: Dur First/Middle Name: Jef

Date of Birth: Gender: Race:

Advanced Search Criteria

Sort Results By:

Search **Clear Form**

Person Search Results

Result(s) 1 - 18 of 18

	Person ID	Name	Address	Gender	DOB	% Match
<input checked="" type="checkbox"/>	500721	Dur		Male	01/08/1968	96

Choose **Close**

HOME | HELP & TRAINING | PRIVACY & SECURITY | [/intake/intake_person_search.jsp](#) d54_u01_find_a_person_screen ST032 version 2.005.17 (04-11-2016 02:32 PM)

- Once you click on the **Choose** button, the person chosen will be listed in the **Participants** list; you will be required to add a **Role** to that person from a drop down of choices. Click **Save**.



The screenshot shows a web interface for managing participants. At the top, it says "Person (1)". Below this is a table with columns: Name, DOB, and Role. The first row contains the name "Duni", the date of birth "01/08/1968", and a dropdown menu for the role. The dropdown menu is open, showing "Other Family Member" as the selected option. A red box highlights the dropdown menu. Below the table, there is a "Person Search" button and a section for "Other Worker (0)". At the bottom, there are "Save" and "Cancel" buttons.

Name	DOB	Role
Duni	01/08/1968	Other Family Member

Person Search

Other Worker (0)

Save Cancel

- If the person is not an existing person, contact the regional FCCR to add them as a person under the **Case Member** tab. The person will appear under Case Members in your recording.

Continue to the next topic

Completing the Recording

- The recording defaults to **Draft** status until it's marked as **Completed**. In order for a case recording to be a viable entry, it must be marked as **Completed**.
- At the bottom of the recording under the **Status** field, click on **Completed** to finish the recording. Then click **Save**.

The screenshot shows a form with a 'Status' dropdown menu. The 'Completed' option is selected and highlighted with a red box. Below the form, the 'Save' button is also highlighted with a red box.

- Once the recording has been marked as **Completed**, you can view it on the **Recording List** screen. Notice the **Delete** link is no longer available. You can click on the **Select** link to go back into the recording screen.

Recording ID	Contact Date	Contact Type	Participant	Entered By
Status	Contact Method			Location
select	27082511	04/12/2016	Private Provider/Child Contact	Du Xe Sa
	Completed	Face To Face		

- System Completed-** If the worker waits beyond thirty days to mark the recording as **Completed**; it will be **System Completed** for them. If this happens, any information in the recording is no longer valid. If it's a face to face recording, the visit will not be counted in face to face reports. Below is a list of three such recordings that were not completed before time ran out. Notice the **Recording ID/Status column**. These recordings are now invalid.

Immediate Protection Agreement	Recording List
Child Care Assistance Program Referral	<div> Add Recording Print </div> <div> Result(s) 1 to 3 of 3 </div>
CFM	
Strengths and Concerns	
Permanency Goals	
Visitation Plan	
Permanency Plan	

Recording ID	Contact Date	Contact Type	Participant	Entered By
Status	Contact Method			Location
select	24678300	02/05/2015		Lock
	System			
	Completed			
select	24383724	12/11/2014	Private Provider/Child Contact; Private Provider/Resource Parent Contact	Lo
	System	Face To Face	Gi Ja H	Ot
	Completed			
select	24383739	12/11/2014	Private Provider/Child Contact; Private Provider/Resource Parent Contact	Lock
	System	Face To Face		Oth
	Completed			

Continue to the next topic

Adding an Addendum to a Completed Recording

Once a recording is marked as **Completed**, an Addendum can be added.

- Locate the recording, click on the **Select** link by the desired recording as shown on the previous page. At the bottom of the recording, click on the **Add Addendum** button.

The screenshot shows the top of a recording details screen. At the top left, there are buttons for 'Expand' and 'Add Addendum'. The 'Add Addendum' button is highlighted with a red box. Below these buttons, there is a 'Status' dropdown menu set to 'Completed', a 'Completed Date' of '04/14/2016', and a 'Completed By' field with the name 'Ford'. At the bottom left, there are buttons for 'Close' and 'Mark In Error'.

- You will be taken to the **Addendum Detail** screen where you can view your original narrative at the top of the screen. At the bottom of the screen you will see the **Addendum Narrative** box. Enter the additional information and click **Save**.

The screenshot shows the 'Addendum Detail' screen. At the top, there is a section for 'Existing Narrative' with fields for 'Narrative Type: Original', 'Entry Date/Time: 04/14/2016 11:23:31', and 'Entered By: Ford'. Below this is a large text area for the 'Addendum Narrative' with the placeholder text 'Add additional information to the recording here'. This text area is highlighted with a red box. At the bottom left, there are buttons for 'Expand', 'Spell Check', 'Clear', and 'Save'. The 'Save' button is highlighted with a red box.

- You will be returned to the **Narrative Details** screen where you can view the additional narrative at the bottom of the page, it is listed as **Addendum 1**. Click **Close**.

The screenshot shows the 'Narrative Details' screen. It displays a list of narratives. The first narrative is 'Original' with 'Entry Date/Time: 04/14/2016 11:23:31' and 'Entered By: Ford'. The second narrative is 'Addendum 1' with 'Entry Date/Time: 04/14/2016 12:15:42' and 'Entered By: Ford'. Below the list, there is a large text area for 'Add additional information to the recording here'. At the bottom left, there are buttons for 'Expand' and 'Add Addendum'. The 'Add Addendum' button is highlighted with a red box. At the bottom right, there are buttons for 'Close' and 'Mark In Error'. The 'Close' button is highlighted with a red box.

- Once you close the recording, you are taken to the Recordings List screen where you will see a red **(A)** by the **Recording ID** number indicating an **Addendum**.

The screenshot shows the 'Recordings List' screen. On the left, there is a sidebar with links for 'Visitation Plan', 'Permanency Plan', 'Case Services', and 'Court'. The main area contains a table of recordings. The first row is highlighted with a red box. The table has columns for 'Recording ID', 'Status', 'Contact Date', 'Contact Method', 'Contact Type', 'Participant', and 'Entered By Location'. The first row shows a recording with ID '27082511 (A)', status 'Completed', contact date '04/12/2016', contact method 'Face To Face', contact type 'Private Provider/Child Contact', participant 'Dunlap, Ja'vin Maleik; Dunlap, Keelan Xavier; Ford, Anthony J; Fuqua, Erin Samatha', and entered by location 'Ford, Anthony J Family Home'. At the bottom left, there are buttons for 'Add Recording' and 'Print'. The 'Add Recording' button is highlighted with a red box.

Recording ID	Status	Contact Date	Contact Method	Contact Type	Participant	Entered By Location
27082511 (A)	Completed	04/12/2016	Face To Face	Private Provider/Child Contact	Dunlap, Ja'vin Maleik; Dunlap, Keelan Xavier; Ford, Anthony J; Fuqua, Erin Samatha	Ford, Anthony J Family Home

Printing Case Recordings

- In the **Case Recordings** screen, click on the **Search** button to bring up all case recordings. Notice that the **Print** button option is disabled until you click on **Search**.

Case Recording

Forms/Notices

Assessments

Document

CFTM

Strengths and Concerns

Permanency Goals

Visitation Plan

Permanency Plan

Case Services

Court

Recording Search Criteria

Contact From Date: Contact To Date:

Entered By: Location:

Status: Participant:

Contact Type: Contact Method:

Sort Results By:

Search Clear Form

Recording List

Add Recording Print

Result(s) 0 Page 0 of 0

Recording ID	Contact Date	Contact Type	Participant	Entered By
Status	Contact Method			Location
<< To view history or recent activity, complete a search. >>				

- Once all results have returned, the **Print** button is enabled. Click on it to bring up the **Print Recordings List** page.

Permanency Goals

Visitation Plan

Permanency Plan

Case Services

Court

Removal Records

Placement Referral

Search Clear Form

Recording List

Add Recording **Print**

Result(s) 1 to 105 of 105 Page 1 of 1

Recording ID	Contact Date	Contact Type	Participant	Entered By
Status	Contact Method			Location
<input checked="" type="checkbox"/> 27090315	04/12/2016	Private Provider/Child Contact	Dun Keel Fuqi	er; Ford, Family Home
<input checked="" type="checkbox"/> 27025986	03/24/2016	Private Provider/Child Contact	Du Xa	er; Ford, Family Home
<input checked="" type="checkbox"/> 26954211	03/22/2016	Case Manager/Child Contact; Case Manager/Resource Parent Contact	Du We	er; W Resource Home

- You can checkmark the check at the top of the list to automatically check **all** recordings to print, **OR** you can checkmark a single line's check-box for only one (or more) recording(s) to print.
- Once you have made your selection, click on the **Generate** button.

Print Recording List

Result(s) 1 to 105 of 105 Page 1 of 1

<input checked="" type="checkbox"/>	Recording ID	Contact Date	Contact Type	Participant	Entered By
	Status	Contact Method			Location
<input checked="" type="checkbox"/>	27090315	04/12/2016	Private Provider/Child Contact	Dun Keel Fuqi	er; Ford, Family Home
<input checked="" type="checkbox"/>	27025986	03/24/2016	Private Provider/Child Contact	Du Xa	er; Ford, Family Home
<input checked="" type="checkbox"/>	26954211	03/22/2016	Case Manager/Child Contact; Case Manager/Resource Parent Contact	Du We	er; W Resource Home

Generate Close

- Click on **Generate Report** button to generate the case recordings you have chosen to print.

Reports

Document Category: CASE Work-Item ID: 305 Task ID: 50

Document Title: Case Recording Summary - #NA Work-Item Reference: Fu ia Task Reference:

Document History

Document ID	Date	Document Name

Generate Report Cancel

Continue to the next topic

Frequently Asked Questions

Q. WHY ENTER FACE-TO-FACE (F2F) CONTACTS?

- A. Best practice, and the goal of attaining permanency for children, dictates that every child-welfare entity, either the Department or a member of the private provider community, ensures those children experience consistent, **face-to-face** contact and visitation with parents, siblings, extended family and private provider clinical staff (when being served by a private provider). These visits and contacts are critical to family engagement and help ensure a seamless integration for the child when transitioning from custodial care to reunification and permanency.

Q. HOW CAN WE EFFECTIVELY RECORD AND TRACK THOSE CONTACTS?

- A. The Department has been mandated to track all **face-to-face** contacts to ensure compliance. This tracking must be accomplished by some means other than "pen and pencil" documentation. The ability of private providers to enter these contacts directly into TFACTS is the mechanism by which these occurrences will be tracked.

Q. HOW DO WE MAKE THIS HAPPEN?

- A. Designated staff members from provider agencies will be given access to TFACTS and those staff members will enter this F2F contact information.

Q. WHAT ACTUALLY CONSTITUTES A FACE-TO-FACE CONTACT

- A. **Face-to-Face Contact with Child or Youth**_- This is used when a person directly involved in private provider case management makes actual, physical face-to-face contact with the child or youth. ***This contact will be called Private Provider/Child Contact in TFACTS.***

Family/Sibling/ResourceParent Visitation Face-to-Face Contact_- This is used when the child or youth visits with a sibling or other family member (such as a parent or other relative) and a private provider case manager or other case management staff who meet the requirements for face-to-face are also present for the visit.

You have now completed this storyboard.